

4 February 1986

MEMORANDUM FOR: *All group chiefs, DD-~~a~~, D/OIT, C/AS, C/HQ*
FROM: O/D/OIT
SUBJECT: OIT Secretarial Training Requirements

The secretary to the EXDIR has asked me to solicit input from you concerning what training you think should be required of secretaries in OIT. The types of skills to be considered are: basic (typing, shorthand, etc.); technical (automation--word processors, computers, etc.); management (correspondence, conferencing, etc.); and executive development.

She suggested you consider such questions as the following:

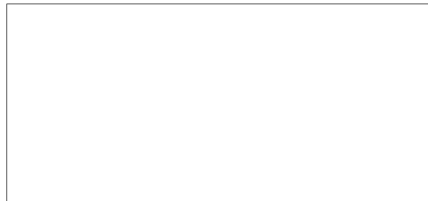
What types of skills do your new EODs have and what do they need?

Evaluate your secretaries. What type of training and skills are lacking? What training would you like them to have such as computer, grammar, editing/proofing, supervisory, inter-personal skills, protocol (office etiquette, telephones), etc.

In what priority do you want them to take the training?

This information will be given to the Secretarial Task Force for their use in establishing the training requirements for advancement within the new secretarial career service.

Please send me your input by COB, 12 February. Thank you.



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- (over)
1. In general, indeterminate about the value of the work to the Agency. It is worth a career commitment. It should not be a mere pass-through to some other work.
 2. Most young secretaries need to learn organizational and thinking skills. They have good enough sten skills if they've passed Agency tests.
 3. Telephone answering and accurate, polite message taking.

4. All need computer and w/p indoctrination. We need some basic "fixit" instruction, too, so that secretaries can have some sense of why w/p and terminals act up, and where to hit them or whom to call.
5. Training in Agency structure, function, and the relationships of the parts to each other and to the larger intelligence and policy communities. Early course with periodic refreshers.
6. A course in why the CIA and the intelligence profession are special -- and why they are special for secretaries.
7. Some instruction in box-handling or dealing with the multiple personalities in a typical Agency office.

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ROUTING AND RECORD SHEET**SUBJECT:** (Optional)

Training Requirements

FROM:

O/D/CO

EXTENSION**NO.****DATE**

30 January 1986

TO: (Officer designation, room number, and building)**DATE****OFFICER'S INITIALS****COMMENTS** (Number each comment to show from whom to whom. Draw a line across column after each comment.)**RECEIVED****FORWARDED**

1. Nancy
O/D/OIT
2D00 HQS

Nancy,

Per our conversation, attached are the notes from the 21 Jan. meeting with the EXDIR's secretary and the description of the New Secretarial Pay Plan Level Training Requirements.

Please solicit input from the OIT managers and secretaries.

I would appreciate receiving OIT's input by 17 February.

Thanks.

~~ADMINISTRATIVE-INTERNAL USE ONLY~~

The Secretary to the Executive Director, Sharon, chaired a meeting on 21 January to provide feedback on the status of the new secretarial pay plan and to request assistance from the attendees in obtaining information from the Directorates/Offices represented regarding training requirements. Two representatives from each Directorate as well as one representative from the Office of General Counsel and one from the IG Staff were in attendance.

UPDATE

The pay plan is on schedule. Official approval is being sought by spring. Congress has not been approached as of yet regarding the plan. (We are waiting for the right moment.) Congress' formal approval is not necessary to enact the pay plan. Once the plan is approved in late spring or early summer, it will take approximately 90 days to implement.

The consultants, thus far, are in basic agreement with the plan. They have made a few suggestions regarding the pay scale. These include capping the pay scale at \$34,000 vice \$37,000 and the steps in Levels II, III and IV would occur annually vice biannually. The consultants felt the salaries at the entry level were not competitive and we were being a bit generous on the higher end.

The consultants next step is to take a look at the level conversions. They plan to take a sampling of positions, review the position descriptions and interview the incumbents. Levels I and II will be converted at the Office level. Levels III and IV will be done at the Directorate level. PMCD will serve in an advisory capacity.

The composition and duties of the Executive Secretarial Board were discussed briefly. The Board's membership is envisioned to be composed of a representative from each Directorate and a chairman. Each Directorate will be solicited for candidates to serve on the Board.

TRAINING

The consultants will be looking at OTE's training program.

OTE will be responsible for developing the curriculum for the pay plan. (Board will also play a part.) [redacted] has been named chief of the OTE branch that will be responsible for developing/implementing the secretarial training program.

~~ADMINISTRATIVE-INTERNAL USE ONLY~~

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The types of skills that need to be looked at are: basic (typing, shorthand, etc), technical (automation--word processors, Delta Data, etc.), management (correspondence, conferencing, etc.), and executive development.

Attendees were requested to gather information as to what our respective Directorates think is required in regards to training.

The following statements may give you an insight as to what types of things that need to be considered in recognizing your training requirements.

- What types of skills do your new EODs possess?
And, what do they need?
- Evaluate the employees you have.. What types of training/skills do they need.
- Identify the types of courses that your employees need.
What order should they be taken?
- What courses are mobile? What and how do we take courses to the field.
- How do we implement the training?

*not a curriculum -
solve how secretaries perceive what they think is
required? I see work - what ^{skills} lacking
grammar etc - need basic of tech or
mgmt. or need exp. dev. (supervisory,
problem sol.) inter personal skills -*

or are fine

*not a course name - but a type of skill -
writing ability - editing ability -
computer training
list in prior if others*

ADMINISTRATIVE-INTERNAL USE ONLY

ATTACHMENT A

DEFINITION OF FOUR SECRETARIAL LEVELS

LEVEL I
SECRETARIAL TRAINEE

NATURE OF WORK: Work requires basic secretarial skills and knowledge of basic or commonly used rules, procedures, and office operations. Duties include routine typing, receptionist, correspondence control, and filing services for the office. The incumbent learns Agency-unique formats, the Agency record systems, and any word or data processing systems used in the office assigned. The incumbent is indoctrinated into the culture of an intelligence organization and learns the practices and principles of security and compartmentation. While the work at this level normally has little impact outside the immediate office, the incumbent is familiarized with the mission and functions of the office and how it fits into the larger organization.

TRAINING REQUIREMENTS: While in Level I, secretaries are expected, as a condition of advancement, to have completed the following OTE Level I required courses and, as availability permits, some of the recommended courses. Component career panels have responsibility for monitoring secretarial training against requirements and space availability.

Required Courses:

- Agency Orientation & Office Procedures
(classroom training, 3 days, full-time)
- Correspondence Techniques
(classroom, 3 days, to be developed)
- Grammar Review
(self-study, to be developed)
- Word Processing
(classroom training, 3 days, full-time or self-study)

Recommended Courses:

- Proofreading
(classroom, 4 days, part-time or self-study)
- Office Orientation
(classroom or videotape)
- VM or Computer training
(classroom, self-study, or test)

QUALIFICATIONS: To be placed in Level I, the secretary must pass the Agency Typing Test, the Standard Employment Test (SET), and must have a high school diploma or equivalent (e.g. GED).

Note: The overseas training requirements are not addressed in this draft.

Advancement to Level II: Requires completion of required courses for Level I and normally two years of Agency secretarial experience. Time-in-grade guidelines may be waived by the Head of the Career Service for exceptional performance. Each Directorate and the E Career Service can specify the type and range of experience required.

A career service panel will evaluate and rank secretaries, forwarding advancement recommendations to the Head of the Career Service for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations. The career service panel will also forward secretarial performance award recommendations to the Head of the Career Service for approval.

Entrance on duty into Level II requires passing the Agency typing and SET tests and having five years of relevant experience in the private sector. At least two years of full time (or part time equivalent) related vocational and/or college course work can substitute for the experience criterion (see Agency Secretarial Hiring Guidelines, dated September 1985).

The following are examples of experience requirements to be obtained in Level I:

Basic understanding of the organization of the Agency and familiarization with names of key officials.

Must demonstrate an understanding of basic security requirements of working in an intelligence organization, for example:

- Proper use of black, red, and secure lines, and how to handle cover calls
- Familiarization with classification guidelines (the handbook, handling and mailing classified material, especially TS)
- Proper disposal of classified trash
- Opening, monitoring, and securing safes, vaults, typewriters, and other office equipment
- Monitoring visitors, including char force, maintenance personnel foreign liaison personnel

Must demonstrate an understanding of basic compartmentation requirements of the Agency, for example:

- A general understanding of source and methods (need-to-know principle and what should not be discussed outside the office)
- Understanding of document and file control procedures
- Understanding of the principle to deny release of information to an unknown person, either on the telephone or in person

Must demonstrate an understanding of Agency secretarial procedures, for example:

- Understanding of correspondence formats and dissemination procedures
- Understanding of office filing system
- Telephone message procedures
- Appointment calendar procedures

LEVEL II
SECRETARY

Nature of Work: Work requires knowledge of an extensive body of rules, procedures, and office operations. Work may require knowledge of the organization, mission, and key players of other offices. The secretary, in addition to Level I work, establishes and maintains filing and suspense systems; drafts routine and recurring statistical/information reports; arranges routine travel and meetings; maintains the supervisor's calendar; reviews outgoing correspondence for format and accuracy; relays information from the supervisor to his/her subordinates and helps set priorities by organizing the supervisor's mail, telephone calls, and visitors. The work of Level II requires an understanding of office responsibilities within the Directorate and usually a general knowledge of the discipline (e.g. Personnel, Geography, Area-specific Analysis, Security, Logistics, Operations). In this operational context, the secretary must be able to prioritize tasks, plan work, and handle interruptions without disruption to the overall functioning of the office. The secretary at Level II helps in the orientation and acculturation of new secretaries.

Training Requirements: To be eligible for advancement, must have completed the following required courses and 20 hours of recommended training while in Level II. Component career panels have the responsibility of monitoring secretarial training against requirements and space availability.

Required Course:

- ° Professional Office Protocol
(classroom, to be developed)
- ° Directorate Orientation
(classroom, 1-2 days, part-time)
- ° CIA Orientation Courses
(classroom, 3 days full-time)
- ° Role of Secretary in Automated Office
(classroom, 1 day, full-time)
- ° Time Management
(classroom, 2 days, full-time)
- ° Stress Management
(classroom, 2 days, full-time)
- ° Essentials of Writing
(classroom 5 days, full-time, to be developed)

Recommended Courses:

- ° Shorthand*
(classroom, 10 weeks, part-time; or self-study)

* Shorthand, although not a specific requirement for promotion, is still required in many secretarial positions. Therefore, to be competitive for these positions secretaries should consider taking shorthand.

Recommended courses, continued:

- **Geography (component specific)**
(classroom or self-study/videotape)
- **Employee Development Course**
(classroom, 3 days full-time)
- **Wordprocessing & Computer Training, as applicable**
(classroom)
- **Language Training (as appropriate)**
(classroom, self-study, or test)
- **Proofreading Course**
(classroom, 4 days, part-time or self-study)

Advancement to Level III: Requires completion of the required training at Level II and normally three years experience at Level II. Time-in-grade guidelines may be waived by the Head of the Career Service for exceptional performance. Each Directorate and the E Career Service can specify the type and range of experience required. For example, a combination of headquarters and field assignments, staff and line positions, and exposure to more than one component or unit may be required by a Directorate for advancement to Level III.

A Level II Secretary should have demonstrated an ability to manage the supervisor's appointments; to completely and efficiently coordinate messages, meetings, and office routines; to give guidance to more junior secretaries on formats, work management, and office techniques; and to accomplish most aspects of the job independently, asking for guidance only in unique or first-of-a-kind situations. The secretary at this level should have a good grasp of the bureaucratic structure and operations of the immediate office and how it relates to other components. Knowledge of major operations, key foreign political and liaison service figures, and the operating environment and stations supported by the component is an important factor in the quality of support the secretary is able to provide.

A career service panel will evaluate and rank secretaries, forwarding advancement recommendations to the Head of the Career Service for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with [redacted]. The career service panel will also forward secretarial performance award recommendations to the Head of the Career Service for approval.

Entrance on duty into Level III requires a minimum six years relevant experience in the private sector, three of which must have been in a senior executive secretarial-level position, and passing the Agency typing and SET tests. At least four years of full time (or part time equivalent) in Secretarial Science or a related field may be substituted for the experience requirement. Four years of nonrelated vocational or college course work can substitute for all but two years of the experience criterion (see Agency Secretarial Hiring Guidelines, dated September 1985, Attachment B). Hiring into Level III requires approval of the Head of the Career Service.

LEVEL III
SENIOR SECRETARY

Nature of Work: Work at Level III is significantly more complex than Level II because of the integration of work elements from within Agency components and requires a working knowledge of the Agency's organizational structure, principle managers, practices, policies, and programs. Knowledge of other organizations also is frequently required, e.g., Department of State, foreign liaison services, Federal Bureau of Investigation, President's Foreign Intelligence Advisory Board, Intelligence Oversight Board, or other Intelligence Community agencies. The secretary's work at this level clearly impacts on other components, and contacts maintained in the other components are at a higher level than those of the Secretaries and Secretary Trainees. Secretaries in Level III usually have supervisory responsibility for other clerical staff members. Duties at Level III may include assembling background information for the supervisor; attending meetings and preparing a record of the proceedings; drafting regular and recurring statistical/information reports; arranging travel and conferences involving multiple participants and/or overseas itineraries; screening the supervisor's mail and assigning to other officers items which require preliminary work before being brought to the attention of the supervisor; initiating action on priority items when the supervisor is not available; and supervising and reviewing the work of subordinate secretaries and clerical employees, including having input to their Performance Appraisal Reports, as appropriate. The sensitivity of the work increases significantly at this level and may include

... matters. Judgment and discretion are absolutely essential at level III and above. Secretary may be required to apply writing skills in the drafting of memoranda, responses, and cables:

Training Requirements: To be eligible for advancement, secretaries must have completed the following required courses plus 120 hours of Level III training. Directorate career panels have the responsibility of certifying substitute course work using curriculum guidelines (to be drawn up jointly by the Office of Personnel, the Executive Secretary Board, and the Office of Training).

Required Courses:

- Effective Oral Presentation
(classroom, 4 days, full-time)
- Getting Your Ideas Across
(classroom, 2 days, full-time)
- Supervisory Skills for Secretaries
(classroom, 5 days, full-time)
- Management Skills for Secretaries
(classroom, 3 days, full-time)

Recommended Courses:

- Women in the Work Force
(classroom, 3 days, full-time)
- Leadership Styles & Behavior
(classroom, 5 days, full-time)
- Advanced Writing Course
(classroom, 6 days, part-time)

Recommended courses, continued:

- Management Development Course
(classroom, 5 days, full-time)
- Professional Woman's Course
(classroom, 5 days, full time)
- Psychological Self-Assessment (Looking Glass)
- Area Familiarization Courses
- Level II courses not yet taken

Advancement to Level IV: Requires five years Agency secretarial experience at Level III and successful completion of OTE training requirements. Time-in-grade guidelines may be waived by the Head of the Career Service for exceptional performance. Career services can specify the type and range of experience required. For example, a combination of headquarters and field assignments, staff and line positions, and exposure to more than one component or unit may be required by a Directorate for advancement to Level IV.

Advancement to Level IV is by Directorate or E Career Service nomination. The Directorate career service panel will evaluate and rank annually those eligible secretaries, nominating candidates for advancement to the Head of the Career Service who will approve within the Level IV position and personnel ceiling constraints. The career service panel will also forward to the Head of the Career Service for approval secretarial performance award recommendations. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations.

Level III candidates must have demonstrated a strong working knowledge of all Agency correspondence formats, the Agency records system, travel and accounting systems, the organization structure and functions, principle managers, and have engaged in increasingly more substantive tasking in the field. The Level III Secretary must understand the protocol, sources and methods, and political implications of internal and external contacts. The initiative, ability to analyze situations and decide on a course of action, and interpersonal skills are critical.

Examples of required skills and successful performance include:

- Understanding of the organization, principle managers, practices, policies, and programs
- Knowledge of other organizations:
(e.g., Department of State, FBI, domestic and foreign organizations)
- Demonstration of supervisory capability
- Understanding of statutes, policies & regulations
- Demonstration of strong organization and office management and expediting skills

LEVEL IV
EXECUTIVE SECRETARY

Nature of Work: In addition to the duties of Level III, Level IV work is characterized by the substantive tasking of a secretarial office manager who typically coordinates the integration of work flow from many different components and often from inter-agency working groups. The skills and knowledge required to perform effectively require a thorough understanding of the statutes, mandates, philosophy, regulations, and policy under which the Agency functions in the Intelligence Community. Work often requires regular contact with counterparts and officials in other Agencies to coordinate conferences, tasking deadlines, and liaison for the manager the secretary supports. The scope and effect of the manager's responsibilities impact on an Agency-wide or national level such that discretion and sophistication are required of the secretary in performing the work. Work requires a thorough working knowledge of the Agency, the manager's primary views and policies, and principle managers and secretaries in the Intelligence Community. The Level IV Secretary organizes and directs the day-to-day activities of the office, restructuring the work activities of subordinates to better accomplish program goals when necessary.

Secretaries performing Level IV work have the management skills and knowledge of the organization to be able to fulfill surge requirements throughout the Agency. Work at this level may require short or long term rotational assignments to meet crisis requirements when world events require an immediate Agency intelligence response or to support National Security Council tasking (e.g., secretarial support to the Arms Control Intelligence Staff). During these situations, the secretary expedites and oversees tasking deadlines of the office, coordinates with other components who must respond to cable traffic (e.g., personnel, security on travel arrangements of officials), and supervises the typing, record keeping, and tasking of subordinate secretaries, clerk typists, administrative assistants, or other support occupations. Assignments at this level may require secretarial coverage in offices where the principle secretary is in training, on leave, away on TDY, or is otherwise not available to perform the job. At times, the work may require TDY trips in advance of the manager's TDY travel or independent of the manager in support of Agency tasking requirements.

Training Requirements: While in Level IV, secretaries are eligible to take the Level IV courses listed below (some of the courses are by Directorate nomination). Directorate career panels have the responsibility for monitoring Executive Secretarial training.

Recommended Courses:

- Mid-Career for Secretaries
(classroom, to be developed)
- Program on Creative Management
(classroom, 5 1/2 days, full-time)
- Management Skills for Secretaries
[] classroom, 3 days, full-time)
- Management Development Course
(classroom, 5 days, full-time)

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